



Office of Engineering
Project Development Division
Bridge Design Section
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John Bel Edwards, Governor
Shawn D. Wilson, Ph.D., Secretary

MEMORANDUM

TO: ALL CONSULTANTS
ALL BRIDGE DESIGNERS

FROM: ZHENGZHENG "JENNY" FU, P.E. 
BRIDGE DESIGN ENGINEER ADMINISTRATOR

SUBJECT: BRIDGE DESIGN TECHNICAL MEMORANDUM NO. 92 (BDTM.92)
PUBLICATION OF BRIDGE DESIGN INVOICE PROCESSING STANDARD
OPERATING PROCEDURE (SOP)

DATE: June 26, 2020

Effectively immediately, in addition to all applicable LA DOTD Consultant Contract Services Section invoicing requirements, all invoices for consultant contracts managed by the Bridge Design Section shall conform to the attached Standard Operating Procedure (SOP). Invoices not conforming to the attached SOP will be returned for correction without review. This SOP will improve the efficiency of invoice processing in Bridge Design Section.

The attached SOP supplements Part I, Chapter 10 of the Bridge Design and Evaluation Manual.

This technical memorandum is posted on the LA DOTD Website under [Inside La DOTD > Divisions - Engineering > Bridge Design > Technical Memoranda - BDTMs.](#)

Please contact Kelly Kemp (225-379-1809, kelly.kemp@la.gov) if you have questions or comments.

ZZF/kmk

Cc: Christopher P. Knotts (Chief Engineer)
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LADOTD Bridge Design Section
Standard Operating Procedure (SOP)
Consultant Contract Invoice Processing

In addition to all applicable LADOTD Consultant Contract Services Section invoicing requirements, all invoices for contracts managed by the Bridge Design Section shall conform to the following or they will be returned for correction without review.

1. LADOTD Bridge Design Personnel Definitions:

1.1 Contract Manager (CM):

Individual responsible for the administrative oversight of the contract. The contract can be a project specific contract or a task order under an IDIQ contract. For IDIQ contracts, the contract manager refers to the individual who is responsible for the oversight of the task order.

1.2 Invoice Coordinator (IC):

Individual responsible for the processing of invoices and resolving related issues.

1.3 IDIQ Contract Manager (IDIQ CM):

Individual responsible for the oversight of the IDIQ contract, but not necessarily the oversight of task orders under the IDIQ contract.

2. Consultant Responsibilities:

2.1 Invoicing Frequency:

All open contracts, including all task orders, shall be invoiced on a monthly basis. This includes the submittal of zero dollar invoices when applicable. When multiple invoices are required under a project specific contract or an IDIQ contract, they shall be submitted simultaneously. For example, task order invoices shall not be sent individually; invoices for all active task orders under an IDIQ contract shall be submitted simultaneously every month.

2.2 Required Information:

A current progress schedule, and a summary of the work performed during the billing period, shall be provided with each invoice. The level of detail provided should be sufficient to justify the work billed and the progress that has been made.

2.3 Electronic Submittal via ProjectWise:

Create folders and upload all invoices to the following ProjectWise location, utilizing the following format:

pw:\\PROJECTWISE.dotd.state.la.us:LADOTD_Corp\\Documents_Consultants\\
ConsultantName_Contract Number\\Inbox_DOTD\\Project #_Purchase Order #_YYYY-MM_Invoice #.pdf

e.g. ...\\XYZ Consultants_44-12345\\Inbox_DOTD\\H.012345_22-123456_2020-07_1.pdf

After uploading all invoices, a notification email shall be sent to the IC. For project specific contracts, copy the CM; for IDIQ contracts, copy the IDIQ CM. The transmittal email shall contain a list of the uploaded invoices and the associated balance due for each.

Please note that professional services contracts will not be assigned a purchase order number. In such cases, simply omit the section of the file name as appropriate.

3. Bridge Design Section Staff Responsibilities:

3.1 Invoice Distribution (by IC):

After Consultants upload all invoices for contracts into ProjectWise, no action is required for the CM at this time. The IC will perform a cursory review of the invoices, review/complete the invoice checklists (including signing on behalf of the LADOTD Project Manager as necessary), ensure the appropriate DBE form has been included, attach the Purchase Order Overview sheets to the back of the invoices, and send notification emails to the CMs. CMs shall utilize the link in the email to access the invoices for review.

3.2 Invoice Review (by CM):

Invoice review should, at minimum, consist of: ensuring the amount invoiced is commensurate with the work performed; ensuring any supporting documentation adequately justifies the submitted man-hours or direct expenses; and ensuring adequate funds are available for payment. Invoice review should be completed within seven days of receipt.

3.3 Invoice Approval (by CM):

If the invoice is satisfactory to the CM, the CM shall stamp the invoice "Reviewed & Approved for Further Processing" and save the file in the same ProjectWise folder, renaming the new file with the extension "Approved" (e.g. the reviewed invoice file "H.012345_22-123456_2020-07_1.pdf" shall be saved as "H.012345_22-123456_2020-07_1 Approved.pdf"). The CM shall use the voting button "**All Invoices Reviewed and Approved**" in the email from the Coordinator to indicate that the invoice has been approved. No further action will be required by the CM after the invoice is approved.

For Zero-Dollar Invoices, the IC will approve zero-dollar invoices. However, the IC will still provide notification of the invoice to the CMs, indicating that the invoices were zero-dollar invoices. The CM shall use the voting button "**Zero Dollar Invoice(s) Only**" in the email from the IC to acknowledge receipt of the invoice. No further action will be required by the CM.

3.4 Invoice Rejection (by CM):

If the invoice is not acceptable to the CM, the CM shall mark-up the invoice, identifying the issues that need to be addressed or corrected by the consultant. Depending on the complexity of the issues with the invoice, the CM shall either:

- Work directly with the consultant to resolve the issues. Once satisfactorily corrected, the CM shall save the approved invoice in ProjectWise in accordance with the "Invoice Approval" guidance above; or
- Save the marked-up invoice in the same ProjectWise folder, renaming the new file with the extension "Rejected" (e.g. the marked-up invoice file "H.012345_22-123456_2020-07-1.pdf" shall be saved as "H.012345_22-123456_2020-07_1 Rejected.pdf"). The CM shall use the voting button "**One or More Invoices Rejected**" in the email from the IC to indicate that the invoice has been rejected and should be returned to the consultant for correction. No further action will be required by the CM.

3.5 Invoice Submittal (by IC):

Upon voting notification, the IC will upload approved invoices to CCS ITracker or return rejected invoices to the consultant as appropriate.

For professional services contracts, the IC will forward approved invoices to the Administrative Program Specialist in Bridge Design, who will set up payment for those invoices directly.

4. Inquiries:

All inquiries related to invoicing shall be sent to the IC with the CM copied. Inquiries related to IDIQ contracts should be directed to the IDIQ CM. Inquiries related to project should be directed to LADOTD Project Managers and Bridge Task Managers.